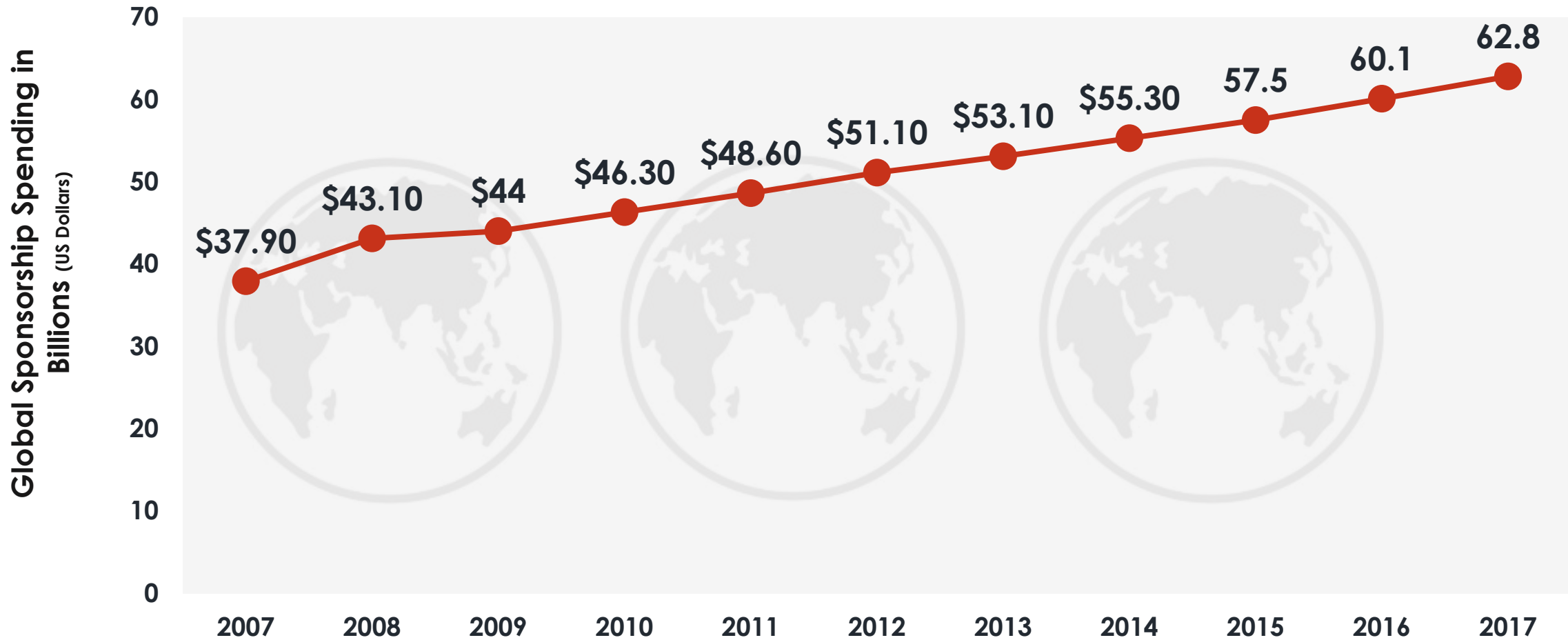
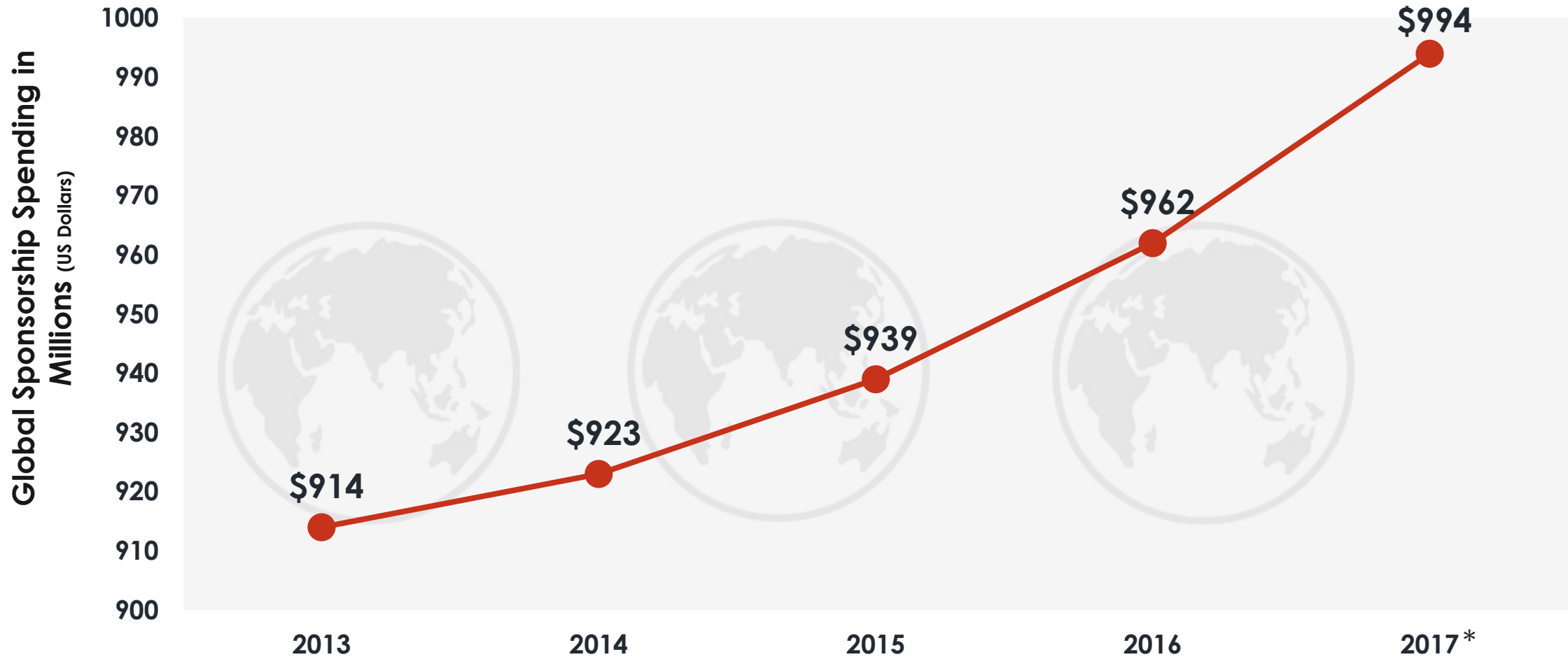


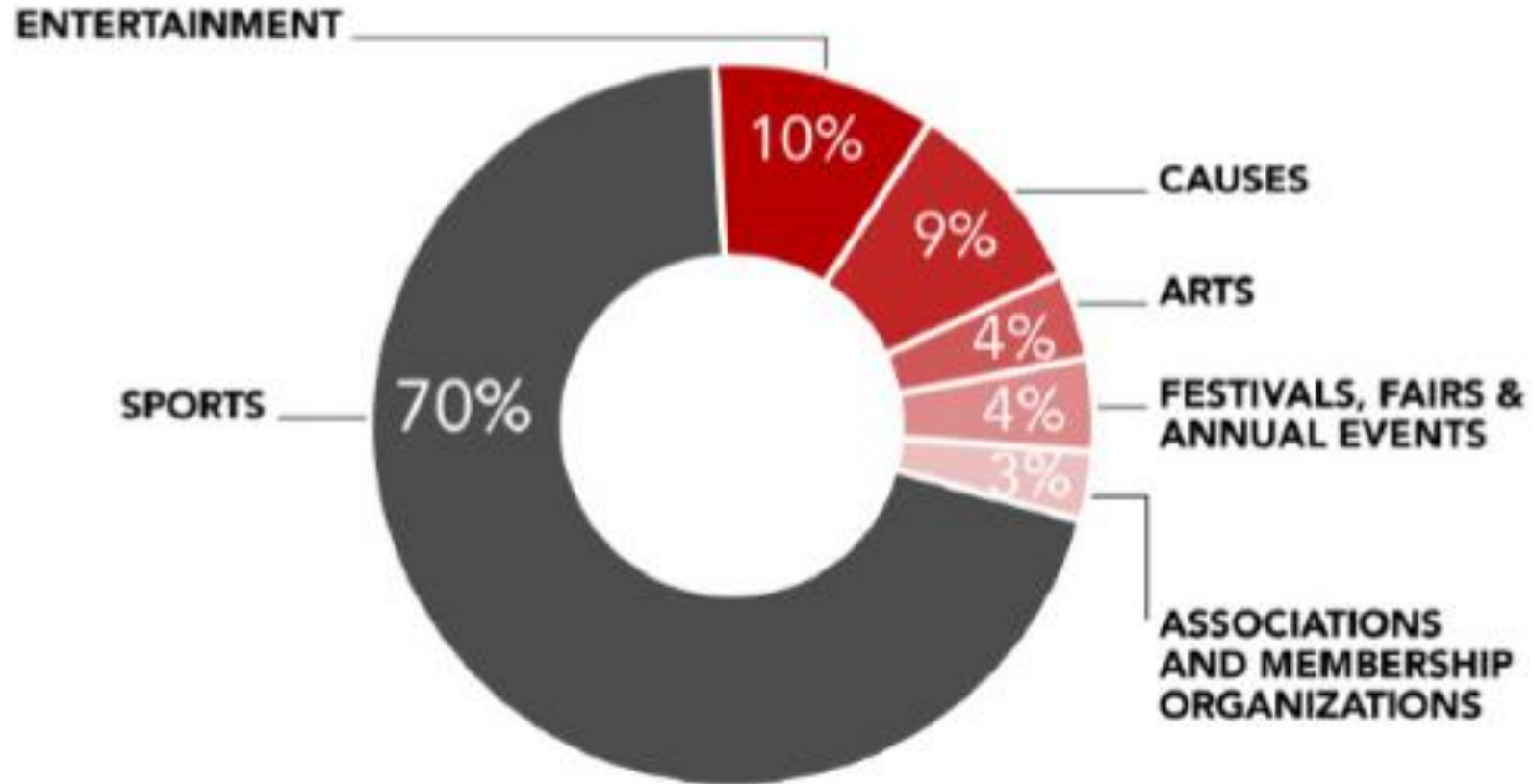
Global Sponsorship Spending Continues to Rise



Growth of U.S. Sponsorship Spending in the Arts



Where the Sponsorship Dollars Go

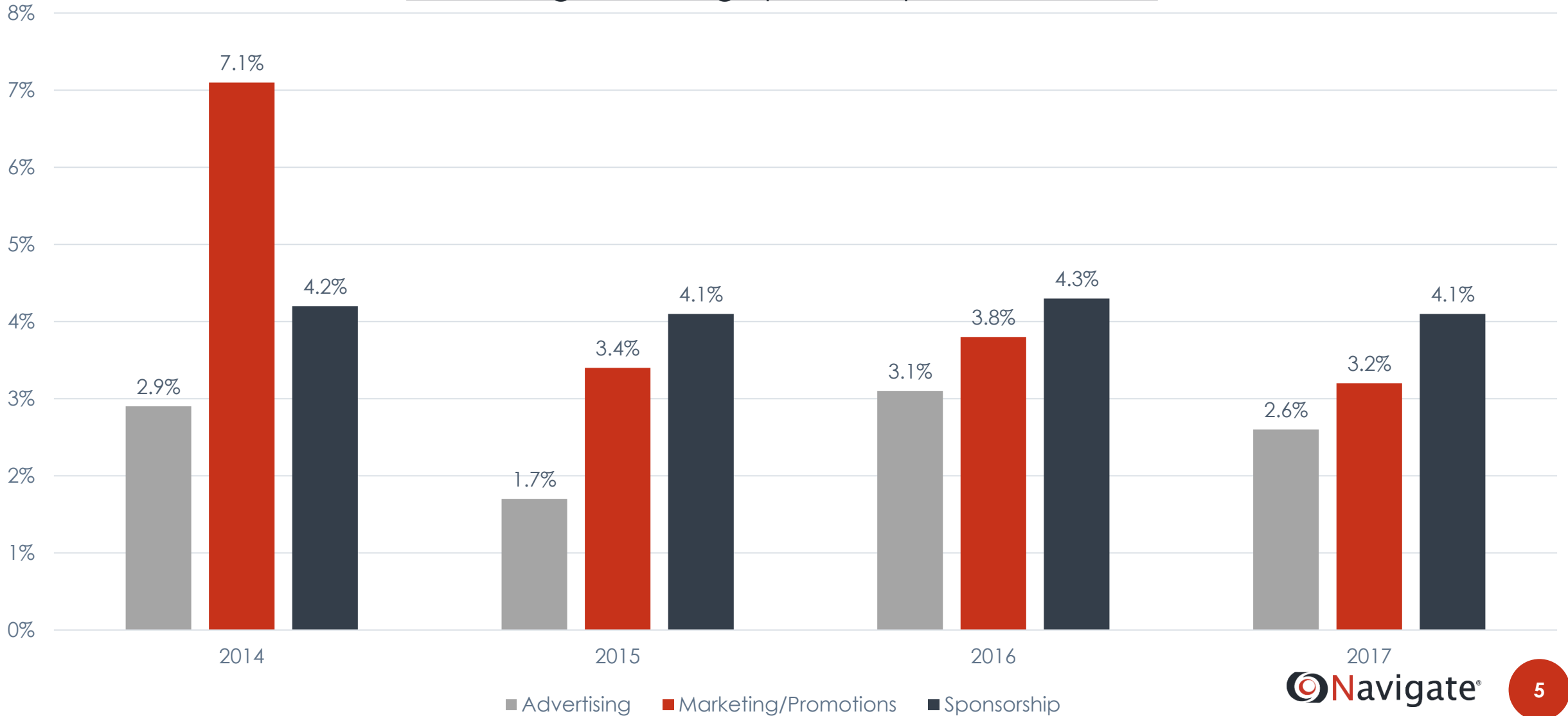


How the Arts Spend Stacks Up Against the Competition

	2015 SPENDING	2016 SPENDING	INCREASE FROM 2015	2017 SPENDING (PROJECTED)	INCREASE FROM 2016 (PROJECTED)
SPORTS	\$14.99B	\$15.17B	4.7%	\$16.37B	4.3%
ENTERTAINMENT	\$2.13B	\$2.22B	3.8%	\$2.3B	3.9%
CAUSES	\$1.92B	\$1.99B	3.3%	\$2.06B	3.6%
ARTS	\$939M	\$962M	2.4%	\$994M	3.3%
FESTIVALS, FAIRS & ANNUAL EVENTS	\$860M	\$878M	2.1%	\$904M	3.3%
ASSOCIATIONS & MEMBERSHIP ORGANIZATIONS	\$591M	\$604M	2.2%	\$612M	3.6%

Sponsors Find Higher Return on Sponsorship vs. Traditional Advertising

Advertising/Marketing/Sponsorship Annual Growth



Best Practices

✓ **Set Sponsorship Up for Success**

✓ Leverage Your Strengths

✓ Get Creative

✓ Measure, Measure, Measure

ACTIVATION *vs.* **RIGHTS**

50 CENTS

*For
Every*

ONE DOLLAR

AWARE FANS ARE

3X more likely to purchase

2X more likely to recommend

Best Practices

- ✓ Set Sponsors Up for Success
- ✓ **Leverage Your Strengths**
- ✓ Get Creative
- ✓ Measure, Measure, Measure

Unique Audience

The Arts audience is hard to reach through sports sponsorship and advertising...

53%

Do not care about sports

78%

Do not spend their free time at sporting events

43%

Do not regularly watch sports on TV

38%

Do not have a cable subscription & **26%** are considering cancelling

...And is an attractive collection of individuals for brands

51%

More likely to have a post graduate degree

49%

Only buy products from companies with ethics they agree

24%

More likely to earn \$100,000 or more

83%

Do not mind paying extra for quality

Tap into your Influence

You're Invited



2016 Sponsor Summit
March 21st-23rd



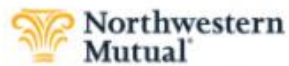
THE PEAKS
Resort & Spa
TELLURIDE, COLORADO

Fewer, Larger Partners

OFFICIAL NCAA® CORPORATE CHAMPIONS



OFFICIAL NCAA® CORPORATE PARTNERS



- Multi-Year Partnerships
- Asset Management
- Category Exclusivity
- Strategic Support

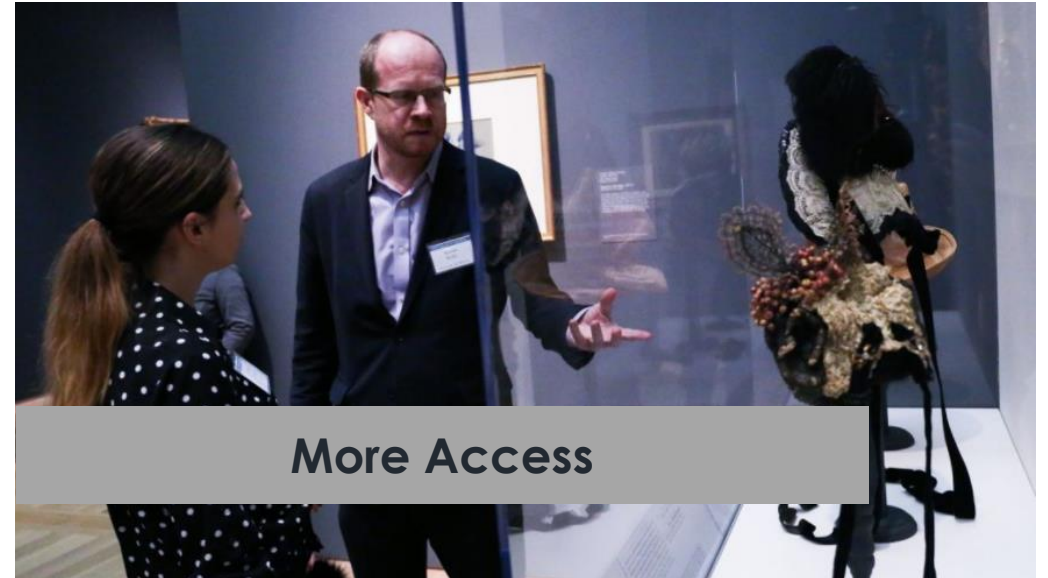
Best Practices

- ✓ Set Sponsorship Up for Success
- ✓ Leverage Your Strengths
- ✓ **Get Creative**
- ✓ Measure, Measure, Measure

Get Creative



Pick Up > Test Drive



More Access



Provide B2B Opportunity

Levels	Buddy (\$25)	Best Friend (\$50)	Steward (\$100)	Protector (\$200)
Adoption certificate	✓	✓	✓	✓
Fact Sheet	✓	✓	✓	✓
Name on Display	✓	✓	✓	✓
Photo			✓	✓
Car decal			✓	✓
Stuffed animal			✓	✓
Family level			✓	✓
person)				✓

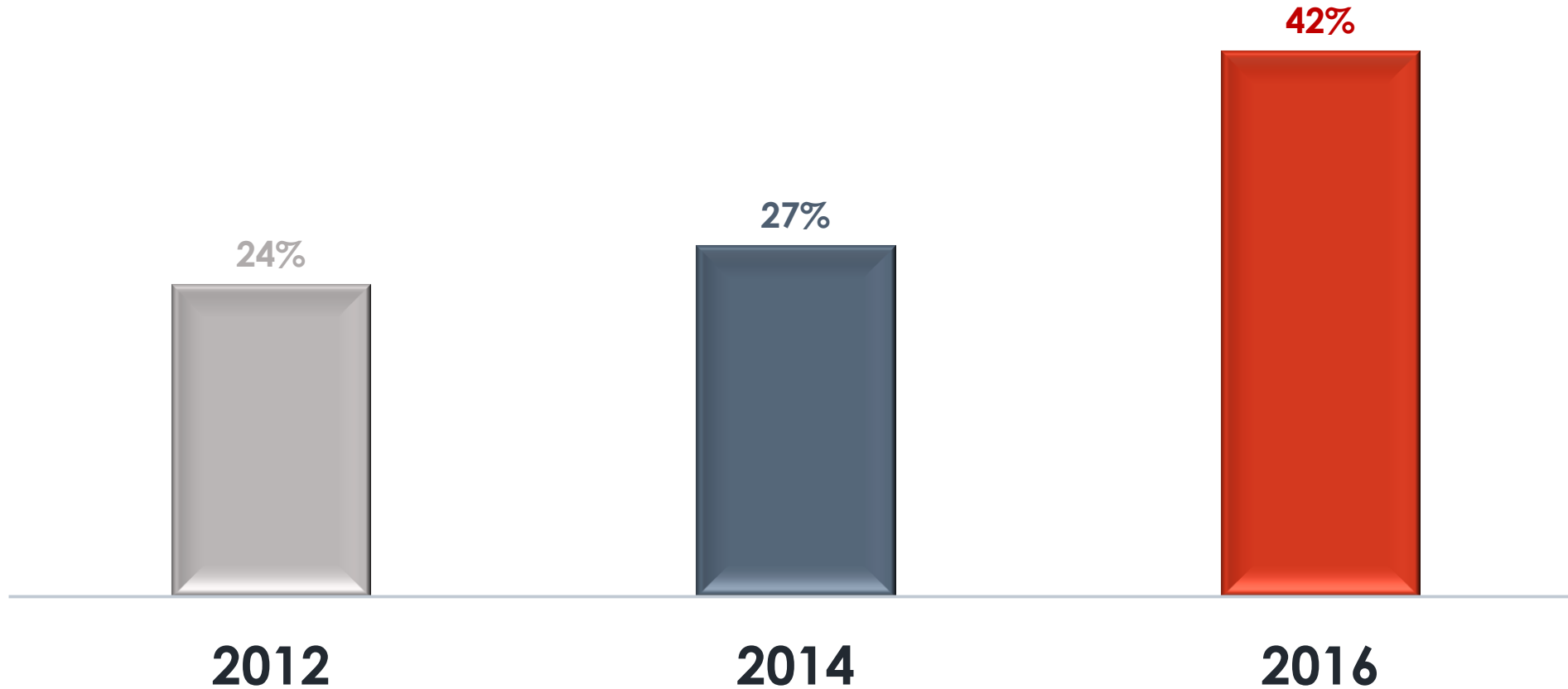
Customization is Key

Best Practices

- ✓ Set Sponsorship Up for Success
- ✓ Leverage Your Strengths
- ✓ Get Creative
- ✓ **Measure, Measure, Measure**

More Brands are Spending LESS on Measuring ROI

Percentage of Sponsors Spending >1% of their Sponsorship Budget on Evaluating Return

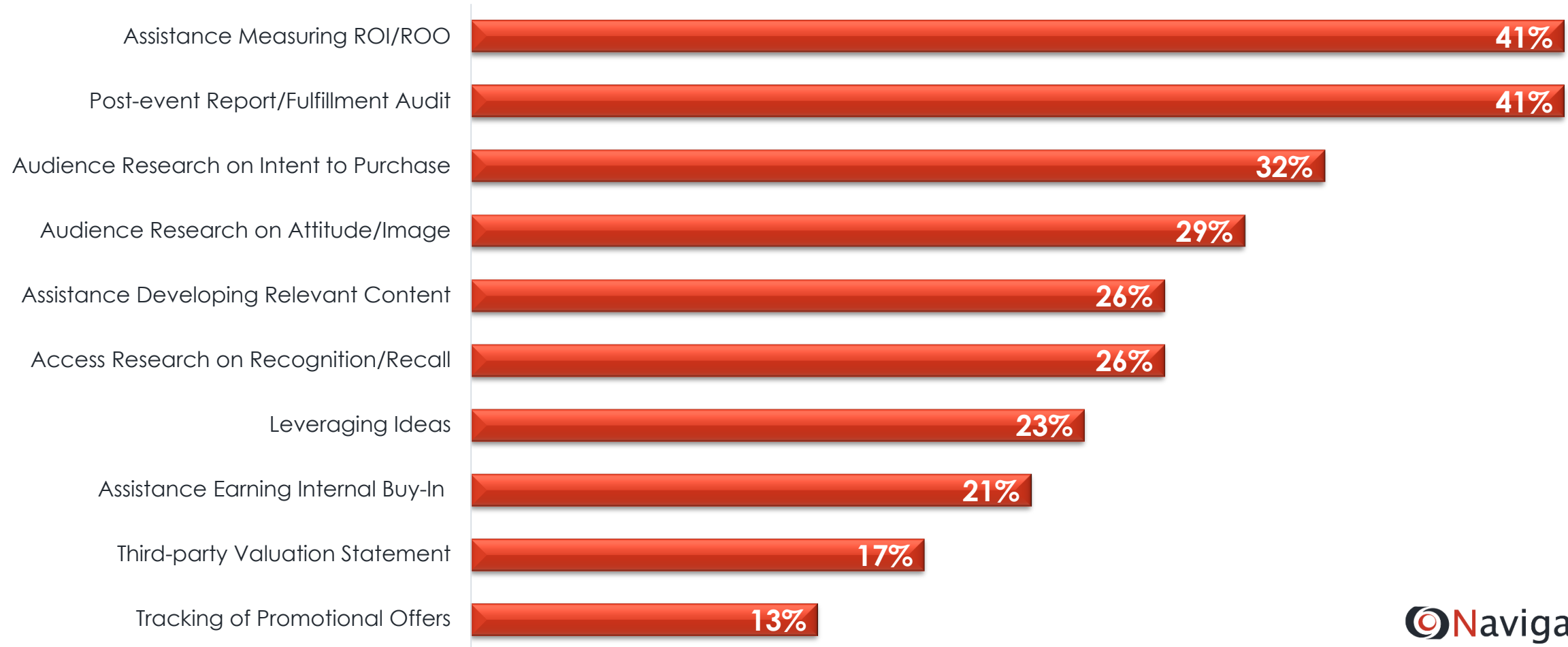


27%
of Sponsors do not put any budget toward measuring return

Sponsors Want Your Help Measuring ROI

Valuable Property-Provided Services

📌 % of respondents who ranked the factor a 9 or a 10



Why Properties Should Spend on Measurement

- ✓ Proactively protect your revenue
- ✓ Create a business case for your partner
- ✓ Control the renewal process
- ✓ Use effectiveness story for future sales opportunities
- ✓ Refine your partnership asset packaging strategy
- ✓ Be a good partner

Measure KPI's to Create a Business Case

TRACK PERFORMANCE IN
KEY METRICS SUCH AS:



All numbers are compared against Navigate's Normative Database, which is a compilation of the hundreds of conducted sponsorship research studies.

Impact Study – Key Findings



KEY METRICS			
Sponsor Awareness		35%	
Consideration	68%		
Purchase Intent	60%		
Likelihood to Recommend	57%		
Sponsorship Influence on Purchase Decision	50%		
Brand Impact	63%		
Sponsorship Fit			32%

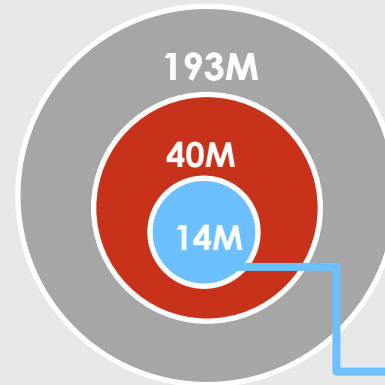
SOCIAL MEDIA IMPACT



FANS WHO VISIT PARTNER'S SOCIAL MEDIA...

... ARE 1.5 times MORE LIKELY TO PURCHASE

SPONSORSHIP AWARENESS & REACH



GEN POP (100%)

FANS (21%)

AWARE FANS (35% of FANS)

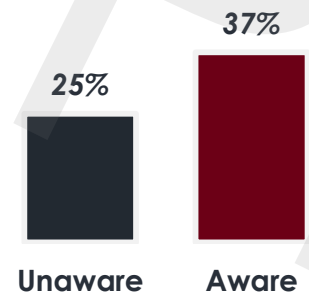
35% of **Property X** Fans are **AWARE** of the partnership

Cost per Aware Fan = **\$1.65***

*Industry norm = \$1.94

MARKET SHARE & ROI INDICATOR

Attendees – MARKET SHARE



INCREMENTAL CUSTOMERS = 1.7 MILLION



CASE STUDY: BMO Harris Sponsorship Impact Study

